

# Local Agency CC

August 4, 2016



# State Updates

- New Staff!
  - Stacy Purdom, Financial Specialist & Alex Long, Health Education Specialist
  - Vacancy in IT- posting this week (testing)
- World Breastfeeding Week!
- Keep an eye out for Outreach Campaign
- New Work Group- meeting week of Oct. 24-28<sup>th</sup>
  - 9 agencies represented (4 from small, 3 from medium and 2 from large)
  - Will post agenda as it nears, always open to observers

# State Plan Updates FFY 2017 (10/1/16)



# Goal this year

- We tried VERY hard to simplify our policies, reduce redundancy, use plain language
- MOST of the updates reflect this and are not actually changes you need to worry about
- The SP should be easier to reference and understand

# Training

- We have a resource called “2017 State Plan Updates: Summary”
- This has every chapter & policy noted with all changes
- ***We will review policy changes today that will affect your day to day, or may be considered significant***
- Other changes may be referenced as needed per the Updates document;
- Staff are responsible for implementing all changes

# Chapter 1



# Chapter 1: Overview

- 1.1 – Minor changes to simplify and clarify the *overview* information in the chapter.
- 1.2 & 1.3 – Policies deleted. Topics were redundant with other areas of the state plan.
- Attachment 27 - Clinic map has been updated to include Park County and Beaverhead, which are both new local agencies.

# Chapter 2





# Chapter 2, Policy 9 Targeting Benefits

Targeting Benefits was deleted because it was redundant with other policies. The other policies in the chapter have been renumbered accordingly.

## Chapter 2, Policy 10: Monitoring

Montana WIC's local agency monitoring process has been completely updated to reflect a new and improved monitoring process.

Please carefully review all sections of policy 2.10 and related attachments. **Training on the new local agency monitoring process will be provided on the October 6, 2016 conference call.**



# Chapter 3



# Chapter 3, Policy 4: Fraud/Abuse/Sanctions

- WIC owned breast pumps was added to fraud and abuse section- “WIC Owned” only (multi-user, not single user)
- May want to incorporate this into your research into fraudulent activities

# Chapter 3, Policy 7: Sep. of Duties

Review separation of duties section

- When 2 people are available to complete cert activities (i.e income verification and issuance), please have duties divided accordingly.
- If one person is completing certs from start to finish (try to avoid when possible), charts will be randomly reviewed from agency quarterly at the State Office
  - This is NOT “new” but clarified and more encouraged

# Chapter 3, Policy 8: Confidentiality

Current MOU'S are listed with their intended purposes:

- Home Visiting- primarily for outreach, coordination, data sharing (statistical analysis)
- Immunizations- primarily for outreach, coordination, data sharing (statistical analysis)
- SNAP/Medicaid/TANF- primarily for outreach, coordination, data sharing (statistical analysis)
- SNAP-Ed- educational materials only
- CACFP- educational materials only



## Cont.

- Regarding MOUs- the Rights and Responsibilities notes that we may share information with other DPHHS programs and to ask clinic for list, see policy 3.8 and have handy to discuss if needed.
- Do not share data outside of the intent of these MOUs, contact the SO if you would like more specific information or to review requests.

# Chapter 3, Policy 11: Civil Rights Statement

Statement updated last year to include “sex” (gender identity) and “retaliation and reprisal” for making a claim.

Short statement changed to, “This institution is an equal opportunity provider”.

This must be on all outreach, materials related to program eligibility and benefits. Most of these changes have already taken place, but SP has been updated throughout.





# Chapter 4



# Chapter 4: Policy 2- Allowable Expenses

- Clarification (not a policy change)
- Education items- may be purchased which are used in education (i.e. a class and you are cooking the food) and must support the purpose of WIC
- Incentive items- must be of ***nominal*** value; must have nutrition message on item which supports purpose of WIC.
- Outreach items- MUST have contact information and civil rights non-discrimination statement



# Chapter 4: Policy 2- Expenses not allowed

- Items to hand out that do not meet the criteria in the last slide
- Items like gift cards, diaper bags, coffee for the office...
- Items for a different fiscal year (ex. no purchasing of services for October in September)

*All expenses MUST be reasonable and necessary and support WIC's purpose.*



# Chapter 4: Policy 5- Staffing

- New employees must attend NET within 12 months
- CPAs may approve special formulas (also covered in ch. 8)
  - Will provide training on this in Sept.
- Language to support CPAs primarily being the ones to do nutrition assessment activities (health hx, asking questions, assessing and discussing growth).
- Refer to “Nutrition Education Coordinator” rather than “Training Coordinator” (USDA lingo)

# Chapter 4: Policy 5- Staffing, continued

- Breastfeeding Coordinator- role & training more clearly outlined/updated
  - Must complete CLC within one year (or comparable approved training) & (preferred) have one year of counseling women on BF *or* be IBCLC
  - Responsible for oversight of pump program, BF activities
- New section- LA Staff Training
  - Must submit “Staff Training Form” within 60 days of hire
  - May exempt some of the training with reason (i.e. skillset already present or comparable training in another format)
  - Civil rights training must be completed before MIS access granted



# Chapter 4: Policy 6- CEUs

- ONE form now!
  - Instructions clearly outlined in SP and on form- new attachment
- Remember- 6 units/year for part time (<20 hrs./week) and 12 units/year for full time (>20 hrs./week)
- This is for all staff who provide WIC services, including contract RDs and admin. staff
- Staff Training Form has lots of links to free, online training



# Chapter 4, Policy 11: Appointments

- When someone contacts the program to inquire about eligibility, this starts **the clock** for providing a determination on eligibility
  - MUST enter into SPIRIT
  - MUST complete Initial Contact button including date of first contact AND first appt. offered (even if they do not accept it or miss it)
  - Pregnant women and migrants must be notified within 10 days and all others within 20 days
  - This is NOT a policy change, just more clear language
  - Also noted in 5.1

# Chapter 5





# Chapter 5, Policy 1: Eligibility/Certification

- Initial Contact must be used if there is 2 months between certifications.
- VOC was added as a form of ID
- Native Americans living on reservations may use their mailing address (including PO Box)
- Tribal Programs of SNAP/TANF/Medicaid will not appear in SIS
- Zero Income statement- if used, issue on regular cycle
- Nutrition Risks Code Table: 352 was updated and broken into 352a and 352b; 211 was added; 332 was revised.

Note: You can not issue one month of benefits if a participant does not have all documentation with them



# Chapter 5, Policy 2: Eligibility/Certification

- Voter registration was updated with new disclaimer form
- Blood Screening information includes Masimo Pronto Systems
- Blood testing was clarified: toe's cannot be used with infants who have starting walking and children over one

# Chapter 5, Policy 2: Referrals/IZ

Screening must include:

- Check record (electronic or paper) for the following
  - 4 DTaPs in the first 2 years, about the time they are due
    - 2, 4, 6 and 15 months (check at appt. following this age)
- Request record to be brought to appt. unless available to staff via IZ system or IZ staff.
- Document “up to date” or “not up to date” in IZ section of MIS (in CGS and Mid-Cert Guided script or tab in folder for f/u appts.)
- Coordinate with your IZ nurse when possible.



# Chapter 5, Policy 2: Referrals/IZ

- Must make referrals if not UTD
- May not refuse services if record not available, not UTD with IZ or refuse referral.

# Chapter 6



# Chapter 6: Nutrition Education

- 6.1- There is a State Nutrition Education Plan now
- 6.2- Nutrition Care Plan requirements were updated
  - Frequency of follow up (if different than standard) and type of appointment (i.e. online, group class, high risk with RD, etc.)
  - What needs to be followed up on at the subsequent appointment, such as referrals provided, education given and goals set (unless clearly outlined elsewhere in the SOAP).
  - Measurements needed at subsequent appointments (ht, wt, hgb)
  - Education topic(s)

# Chapter 6, Policy 3: Education Contacts

Added section to reflect mandatory exit counseling when a participant is exiting program and may not re-certify due to categorical ineligibility

- Must give handout (edited for LA information, local resources and participant specific needs/category appropriate)
- Must be documented in MIS (selected in Nutrition Ed topics or in regular note)

# Chapter 7





# Chapter 7, Policy 1: Breastfeeding

- Formula-related items or logo/name of formula company/branded items (not new, just stronger/clarified language)
- Grow and Glow Loving Support training will be part of New Employee Training
  - It is the intent to have all employees have position specific, and/or basic breastfeeding education

# Chapter 7, Policy 3: Breastfeeding

Manual breast pumps may be given to any breastfeeding woman who requests one

***Follow-up on women who receive any type of breast pump within three business days (new timeframe)***

# Chapter 8



## Ch. 8, Policy 3: Milk

Review the milk substitutions of lactose reduced milk

- It is a choice, do not have to assess for symptoms

Soy beverage for clarification about issuing

- Do not have to assess for lactose intolerance or do a trial of lactose free milk prior to issuing; see reasons listed and document reason appropriately

# Ch. 8, Policy 4: Medical Formula and Nutritionals

Consider Medicaid coverage for medical formulas and nutritionals

Credentials for the person signing prescriptions must be present and they must have prescriptive authority

FP III, CPAs can now approve prescriptions and will defer to the RD as needed- Webinar in September!



# Ch 8: Food Packages and Benefit Issuance

8.6 Adding or changing an Authorized Representative must be made in person, or in writing by the participant/original auth. rep. (not by phone).

## 8.8 Formula Tables

- Alimentum updated information on can size and reconstitution amount has been added to all tables
- Nutramigen Toddler information on can size and reconstitution amount has been added to Children Age 1-5 and Women Table

# Attachments



# Attachments

Attachments are now in numerical and alphabetical order

- Most attachments will have the # in the footer, so it is easier to find
- Note that they do not go in order based on chapter (i.e. chapter 1 does not have attachment #1)



# Attachments

- 15- Continuing Education Credit Approval Form: now only 1!
- 20- Formula-Medically Necessary: formulas updated
  - i.e. Prosobee taken off, Alphamino added (Nestle)
- 26- Phone List: updated with new clinics, latest information
- 27- Map: updated with new clinics (Park, Beaverhead and Elmo)
- 28-36- Monitoring Forms: ALL updated, more attached

# Attachments

- 39- Nutrition Risk Code Table: code changes
- 48- Staff Training Form: added
- 49- Voter Registration Disclaimer: added
- 52- Zero Income Statement: deleted instruction to only print one month of benefits

# Definitions



# Definitions

- LARC
- Medical Food
- MOU
- Participant Access





Questions?

Comments or Concerns

# Thank you!

